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Digital Humanities Best Practices: Engaging a Collaborator

Before Collaboration:

Scope of Project:

- What do you want to achieve (scope)? Have initial conversations to identify a best route to achieve your goal(s). What can your project reasonably accomplish?
    - Ask 'what are the benchmarks/objectives of achievement/impact?' rather than 'what do want to build, exactly?' Keep these benchmarks in mind when in discussion with your team/collaborator.
    - Which aspects of the project are absolutely necessary for a satisfactory project? Which are secondary and negotiable?
- What expertise is needed for the project? What individuals/institutions have that expertise?
    - Are potential collaborators *interested* (as well as capable)?
    - Can certain experts be consulted for advice (periodically, or in the planning stage) rather than brought on as fully-engaged project collaborators?
- How do each of these questions apply to the individual collaborators (people)? How do they apply to the collaboration (project)?

→ *Resource: Bethany Nowviskie's "Ten Rules for Humanities Scholars New to Project Management"*

Consider a Written Agreement:

- Is the team/person you are working with a:
    - Collaborator (co-creator; everyone has equal say)
    - Commission relationship (the overall vision belongs to some but others are trusted to envision aspects of the project for pay)
    - Contract (hired professional to execute a specific vision)
- Will team members be asked to sign a contract or charter?
    - Charter - outlines work ethics and ethos, guidelines to follow, desired attitudes (can be appropriate in inter-departmental or inter-institutional work)
    - Contract - can assume hierarchy of power, financial remuneration, deliverables (can be appropriate for outsourced / hired work)
- Will contents of your written agreement differ based on charter or contract model? Is a hybrid appropriate?
- Does a legal resource exist at your university or institution that you can draw upon for support or that can provide standard contract language?

→ *Resources: The Praxis Program's 2014-15 Project Charter*
Tito Sierra's "The Project One-Pager"
Stan Ruecker and Milena Radzikowska's "The Iterative Design of a Project Charter for Interdisciplinary Research"
Industry University Cooperative Centers' 2014 Membership Agreement

With Your Collaborator: Discuss, Agree, and Put in Writing:

Authorship:

- How will authors / collaborators be credited for their work? Would instituting a collaborative review process for authorship be beneficial?

- What amount of work constitutes authorship or collaboration?
- Do credits reflect or imply a hierarchy?
    - If hierarchy isn't desired, how can it be challenged?
    - How can student collaborators be reassured that their contributions will continue to be acknowledged as the project lives on/changes in publications or conference presentations?
- Can parameters for recognition be worked out in advance? Do they need to be ascertained / revisited at the project's end?
- Who will speak for the project at conferences or departmental meetings?

→ *Resources: Collaborators' Bill of Rights*
UCLA's A Student Collaborator's Bill of Rights
Elijah Meeks' "How Collaboration Works and How It Can Fail"

Output / Deliverables Expectations:

- How is scope of work defined?
- As the group works toward achieving its goals, what are the team's expectations for flexibility toward altering the project's course? (Expect change!)
- Could an "If-Then" document help think through favorable outcomes in a variety of possible scenarios?
- What products are being disseminated?
    - Can they be published under creative commons?
    - Can they be built using open-source software?
- What resources does each author need, based on that author's role in the project?
    - Do authors already have the required skills? If not, what do they need to learn?

Project Management Basics:

- Who will be project manager?
- What is the timeframe for project completion?
    - How will progress be tracked, reported, and communicated?
    - Would project management software be useful? (e.g., Basecamp, Wrike, Asana)
    - What scheduled meetings and deadlines can be foreseen upfront and added to a chronologically-organized, shared timeline or calendar?
- What are the project's associated costs?
    - Can the costs of each aspect of the project be broken down (in terms of time or financial resources?)
    - How and when are payments communicated or delivered?
- How will the group make decisions? (designated point-person(s), group vote)
- How might potential conflicts be resolved?
    - Could a designated external point-person act as arbitrator?
    - How will the team compensate for or divide up "lost" work due to a departed team member or missed deadline?

→ *Resources: Sharon M. Leon's "Project Management for Humanists"*
Tom Scheinfeldt's "Intro to Project Planning and Management"

Communication Expectations:

- How can the team maintain open, transparent, frequent communication?
    - What is a reasonable response time?
    - What does "frequent communication" mean for your team?

- What means of communication suit the team?
    - How can digital communication tools be leveraged without overwhelming / inundating project participants? (blogs, wikis, email, listservs, shared digital spaces, instant messaging, websites)
    - Can person-to-person meetings facilitate rapport or enable the group to grapple with especially thorny issues? (in person, on the phone, via skype?)
- If communication records will be kept, how and where?
- Will all team members be included in all meetings / on all correspondence? (balance between inclusivity and information overload)
- How often, when, and where will meetings take place? (only have a meeting if you need to; face-to-face meetings can be crucial; review literature on how to run a meeting since strategies like "let's sideline this for now" can be very useful)

Speaking the Same Language:

- If team members come from different disciplines, how will you understand each other?
- Will you codify a common language, or would doing so collapse nuance and erase expertise? Where is this language made explicit?
- Could communicating via diagrams, mock-ups, or annotated images help avoid misunderstandings?
- Could a "translator" help bridge the gap between expert vocabularies?

Data

- Who is providing the project's data?
- When will data be disseminated? In what form?
- What does the data consist of?

Project Maintenance, Longevity, and Ownership:

- Do collaborators agree on the project's access and openness (whether via Creative Commons licensing, institutional repositories, or other options)?
- Who has physical responsibility or ownership of the project once it is completed?
    - Different collaborators might own different parts
    - Could licenses help determine one party's right to use the other's assets created before the engagement began (in the case of code or proprietary technologies, for example)?
- Who owns assets created in support of the project?
    - Even if one party doesn't "own" an aspect of the project, can they "use" it in the future? How? Would either party benefit from portfolio rights?
    - For a contracted project, does copyright need to be contractually asserted prior to the engagement? If so, will the commissioning party hold full copyright?
- Who manages project data?
- What will happen to the project after completion?
    - Who will fund stewardship of the project after its completion?
    - Whose servers will host it?
    - Who is responsible for maintenance?
    - Who is responsible for storing data created in support of the project?
    - What archive or repository might hold an additional copy?

→ *Resources: Info on licensing code:*

Choosing An OSS License
Creative Commons Licenses

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earlier draft and bibliography archived here

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